2025: AIR TRAVEL FOR A DIGITAL AGE

SITA

CONTENTS

Introduction	3
A changing passenger profile	4
Before the trip	6
At the airport	7
Onboard	10
At arrivals	11
Delivering the future passenger experience	12
Final thoughts	14
Notes and references	15

INTRODUCTION

Technology is changing how passengers interact with the world. This is driving new expectations around the air travel experience and will shape how we will all travel by 2025.

We are in the midst of a significant demographic shift from a pre-digital to a post-digital age. Within 10 years, the majority of the global population will be post-digital generations – those that have grown up interacting with online technology and using it as a way to manage their lives. These post-digital individuals use their mobile devices as a "remote control for life" and depend on artificial intelligence to help them make decisions and take actions.

This demographic shift brings with it the expectation to use technology everywhere – including during travel. This will have a profound impact on how passengers interact with airports and airlines by 2025.

In fact, 83% of airport and airline IT leaders surveyed by SITA believe that this demographic shift will be the most important influence on their digital strategy by 2025[1].

These demands from post-digital passengers will be felt in two major ways:

- Passengers will demand more autonomy as they travel. They want self-service to manage their own journey through the airport and progressively more responsive mobile devices and apps, plus chatbots – supported with the right information.
- These travelers no longer want an experience that is compartmentalized across airlines, airports, border agencies, or other stakeholders involved in their trip. They expect travel to be seamless, where every step fits neatly with the next, delivered as a single, unified experience.

Fundamental to meeting these demands is a requirement for more efficient operations and collaboration between the airlines, airports and other stakeholders responsible for delivering that experience. Without it, we will not be able to deliver the journey digital travelers demand.

Barbara Dalibard
CEO, SITA

83%

AIR TRANSPORT CIOS AND IT EXECUTIVES BELIEVE PASSENGER DEMOGRAPHICS WILL IMPACT THEIR DIGITAL STRATEGIES BY 2025[1]

A CHANGING PASSENGER PROFILE

We are experiencing a significant demographic shift to a digital age in which, by 2025, the majority of people will have grown up interacting with online technology.

DIGITAL DISRUPTION EVERYWHERE

The digital revolution of the past decade or so continues. The personal computer has given rise to the smartphone, the internet has generated mobile networks, cloud services and social media. As we embrace these technologies in our daily lives, they are disrupting our expectations as consumers and how we interact with the world around us. They are also impacting how we choose to travel and changing the way the air transport industry delivers its services.

This has required all businesses to unpick legacy structures, processes and business models in order to forge new digital ones that better respond to their customers' needs.

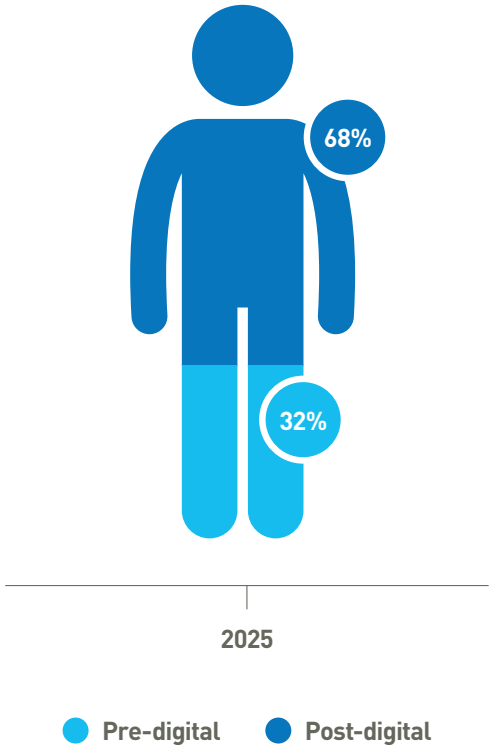
PASSENGERS FROM TWO DIFFERENT WORLDS

Today's air travelers have grown up in two very distinct worlds. Those passengers who were born before 1980 (Silent Generation, Baby Boomers, Generation X), grew up in a world that was pre-digital. In other words, they were educated with paper and books and are more familiar with manual and analogue processes. As a result, they tend to be more comfortable with face-to-face communications.

However, a growing percentage of the traveling public are post-digital travelers are from the post-digital generation, born from 1981 onwards (Millennials or Generation Y, Generation Z). Increasingly these digital travelers are more likely to have been exposed to computers, tablets and smart devices during their upbringing and education. It is second nature for them to exchange texts, video, and voice messages. They are happy to test and try online services and to engage with the latest interfaces such as voice.

They are 'mobile smart' and want hands-on control at each stage of the journey. They are less likely to want face-to-face interactions unless absolutely needed, such as a major disruption in the airport. They use technology in every aspect of their daily lives and they demand the same when they travel.

Crucially, by 2025 this post-digital generation will comprise 68% of the global population[2]. The growing number of digital travelers are demanding the attention of airlines and airports globally.



TRAVELERS ARE EMBRACING TECHNOLOGY TODAY

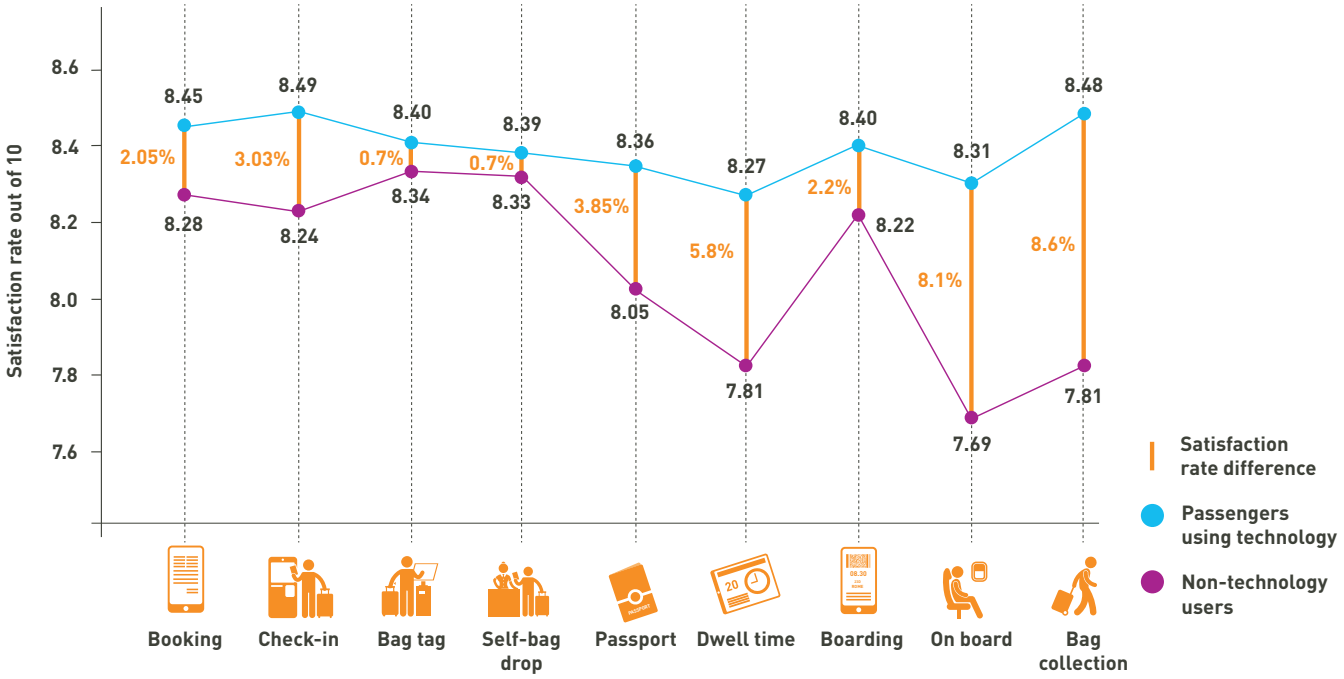
While it is too early to draw firm conclusions about differences in technology usage between pre-digital and digital travelers, SITA's Passenger IT Insights 2019 reveals that a majority of passengers are already using technology across the journey (web, mobile apps, kiosks). They are also demanding more autonomy to manage their trip and more services – particularly mobile – to help them.

Today at the pre-travel step, 54.5% use technology to check-in, either via a website, their mobile, kiosks or automatic check-in. Technology use at other journey stages continues to grow substantially. By way of example, the number of passengers who chose to sail through passport control using automated gates or kiosks doubled to 44% in 2018[3].

Importantly, satisfaction is higher among tech-using passengers at every step of the journey, with a marked rise at dwell time, onboard and bag collection[4].

Over the next few years, we anticipate passengers demanding more services and tools to help them throughout their journey. SITA's research shows that 59% are 'very willing' to use their mobiles for ID verification along the journey, with a further 33% open to the idea.

Passengers are looking to make their journey – be it at pre-travel, at the airport, onboard or arrivals and beyond – as easy as possible and mobile is top of the technologies they want to use.



BEFORE THE TRIP

Looking to 2025, passengers will be using their mobile phones to plan their journey in a more integrated way.

COLLABORATION TO REMOVE FRAGMENTATION

Travelers have to juggle the various apps, messages and documentation required at each stage, making planning stressful.

The ability to bring the various elements of the passenger journey together will be fundamental. Typically, the travel industry addresses each element of the journey separately, rather than seamlessly managing an individual's end-to-end journey. This is an opportunity for airlines, airports and their partners to collaborate to offer more personal and frictionless solutions to ensure the traveler has the right information in their hands.

TREND: CONSUMERS ARE FINDING THEIR VOICE

It is still early days for smart voice technology. However, there are indications that some travelers are already using smart voice technology to help them organize their trips.

Over a quarter of airlines have already implemented artificial intelligence (AI) chatbot services and another 55% are expected to implement them by 2021. The most common airline virtual assistants and chatbots' service is to help passengers with FAQs and flight status information. For example, in January 2019, AirAsia's mobile app and website facelift included an AI-powered chatbot on the live chat feature that can respond to passenger queries instantly in eight languages. Additionally, iPhone users can ask Siri about the status of their upcoming AirAsia flight.

An example of this in action is Chinese travel app Ctrip, which integrated 10 ride-hailing services across the world within its own interface, allowing users to avoid language barriers, payment limitations and the need to download multiple apps[5].

In the face of increasing demands to offer digital services across various channels, airports are looking to extend access to travel industry apps, increasing customer reach, while allowing internal and external developers to access their Application Programing Interfaces (APIs) and open data. SITA's Air Transport IT Insights 2018 reveals that by 2021, API platforms facilitating access for development and open data sharing are projected to be commonplace, when around 70% expect to have an API platform for internal use and/or a platform for both internal and external use[6].

One early adopter of this approach was Miami International Airport, which first used SITA's Day of Travel Services and APIs to update its mobile app in 2016. Wherever in the world the user opens the app, they see options based on their location and receive personalized updates, directions and tips based on that location and their needs. More recently, the airport has integrated Mobile Passport Control for US and Canadian citizens and included a chatbot to track flights and find information about the airport.

85%

PERCENTAGE OF AIRLINES USING ARTIFICIAL INTELLIGENCE FOR VIRTUAL AGENTS AND CHABOTS

AT THE AIRPORT

Once travelers arrive at the airport, they are increasingly demanding a frictionless journey through each checkpoint. Key to this is a single token identity that will allow the passenger to be identified as a known traveler every step of the way.

Today, airports globally are trialing and deploying solutions that allow passengers to use their biometric as their passport or boarding pass at each step in the airport.

By 2025, digital IDs are expected to proliferate and the number of people using a government-issued digital ID will soar from an expected 1.7 billion in 2019 to over 5 billion in 2024[7].

TECH-ENABLED PASSENGERS HAVE BETTER AIRPORT EXPERIENCES

Today's passengers are happier when they can use technology to process their way through airport ID checks and to consume and pay for services. At passport control, those travelers who sailed through self-scanning gates reported the greatest satisfaction – 3.85% higher than those who had their ID checked by a human agent.

Boarding automation is also driving more positive experiences. In 2018, almost a quarter of passengers used e-gates to board their aircraft and, as a result, were 2.2% more satisfied than those boarding with agent assistance.

Tech-enabled passengers are more willing to make use of extra services at the airport. Today, 86% of passengers consume a mix of free and paid-for services, at dwell time and onboard. However, tech-enabled customers consume more of these services, spending 1.5 times more at the airport and 2.5 times extra onboard.

And there are plenty of mobile apps and platforms to help them, be it dedicated airport or airline apps, or consumer platforms such as Inflyter, which enables travelers to order ahead for duty-free products and Grab, which provide seamless airport food ordering.

A BIOMETRIC JOURNEY

Airlines and airports are working to provide travelers with a less stressful path through the airport deploying more automation, such as e-gates, and by using biometric identification to avoid or reduce the need for passengers to repeatedly provide their travel documents at checkpoints.

By 2021, over 70% of airlines have investments planned for biometric ID solutions, albeit mostly pilots, and almost half of airports are planning secure single tokens for all touchpoints[8].

As provision of self-services matures, the next focus will be self-boarding. This is the physical point where airport and airline environments and processes overlap, which is an opportunity to collaborate on improving the experience. By 2021, the majority of airlines expect to have implemented self-boarding gates using biometrics – with or without ID documentation – as well as airport planning to invest in ID management solutions at self-boarding gates[9].

SITA's Smart Path technology has been at the forefront of initiatives to streamline the airport journey using biometric ID and is now in use or being trialed at airports globally, including Hamad International in Qatar and Muscat International in Oman. With Smart Path, passengers are given the choice to register their biometrics at the first step of the journey – normally check-in – and then their face becomes their passport or boarding card at every other step in the journey.

Where Smart Path has been deployed, the results have been extremely positive. At Orlando International Airport, for example, British Airways and the US Custom and Border Protection (CBP) used Smart Path to complete a US government exit and an airline boarding check in one step. British Airways' passengers had the option of biometric boarding at the gate, on flights from Orlando to London Gatwick, with almost 100% take-up, which helped board international flights with 240 passengers in around 10 minutes. Orlando Airport has now chosen SITA's solution to be deployed at all its 30 international gates.

ONE ID FOR ALL JOURNEYS

Today's secure biometric travel tokens are valid for one journey through one airport. However, a key focus for the industry is to take biometric recognition beyond a single airport to a seamless experience across borders and airports. The ambition is to adopt a single, persistent digital identity that is secure, recognized globally and, most importantly, allows the passenger to maintain control over that identity.

Collaboration is under way across the air transport industry and national security agencies globally to agree a single unified way forward. There are several initiatives to enable travelers to store their passport on their smartphone to verify their identity. The International Civil Aviation Organization (ICAO) is working on a digital travel credential that will be issued by governments.

IATA has been spearheading One ID, an initiative that aims to re-invent the passenger journey with a process based on identity management and biometric recognition. Over the past couple of years, more airlines, airports, plus their technology and border control partners, have been trialing various elements of One ID and, in June 2019, at IATA's Annual General Meeting, airline members unanimously resolved to accelerate the global implementation. The next stage will be cross-border trials, allowing the passenger to be recognized by both the departure and arrival airports.

VIEW: TOWARDS A WALK-THROUGH EXPERIENCE

Providing our passengers with a walk-through experience with real-time proactive and personalized information is a key part of our digital strategy. We want them to have a hassle-free path through the airport and biometric identity management is an important enabling technology.

Passengers register their flight details, passport information and facial biometric at the first airport touchpoint and from there on their face is both their passport and boarding pass, providing a seamless experience.

Air traffic at Hamad International Airport is experiencing double-digit growth, which means we have to serve more passengers in the same facility. Biometric identification will help us increase capacity and improve our processes in preparation for the upcoming 2022 FIFA World Cup, which is expected to push passenger numbers as high as 50 million for the year.

Working with SITA's Smart Path has helped us leverage our existing self-service capabilities and platforms to allow passengers to use their face as identification at each step, whether that is at self-bag drop, security or boarding.

We also installed additional sensors at each step and the underlying identity management platform allowed us to assess the true value of this technology to the business, as well as the impact on processes and people.

Biometric identification also benefits our airline partners. Airlines know exactly where to find their passengers in the airport if they need to provide assistance.

Suhail Kadri
Vice President of Information Technology, Hamad International Airport, Doha

مـطـار حـمـد الـدولـي
Hamad International Airport
QATAR قـطـر

PRIVACY AND TRUST PARAMOUNT

Robust privacy and security protocols will be critical to the success of persistent travel tokens and SITA strongly advocates that this will require all governments to agree on standards that will give passengers confidence that their data is secure.

As many of our interactions as consumers and business people – as well as travelers – migrate to digital, multiple sectors are also cooperating to address the need for individuals to secure their identity data. For instance, some of the world's major technology and digital information services organizations are already collaborating on self-sovereign identity.

SITA is among those working with the Sovrin Foundation, an international non-profit organization, to use blockchain to secure identity data in a smartphone wallet and provide a secure mechanism for people to share their identity data with the different entities they interact with online.

By 2025 many more airport and airlines will offer persistent, multi-airport, multiple journey travel tokens. Biometric technology – along with mobile solutions and AI will be critical to creating a secure identity verification solution that everyone –from the passenger to the border agent, trusts. If this solution can be developed, it will deliver a near walk-through experience at the airport.

THE FUTURE OF BIOMETRICS

An indication of the potential for biometric identification to disrupt the air travel experience can be gained from Amazon's reimagining of the retail experience. The Amazon Go concept combines advanced machine learning, computer vision, sensor fusion and AI into the fabric of the store, shoppers use the Amazon Go App on their mobile to enter the store and start shopping. Any product they pick up is added to their virtual cart; if they change their mind, the virtual cart is automatically updated.

There are parallels with air transport. Travelers could be given the option to register and to be identified using mobile apps. This will allow them to use their digital identity beyond completing the required steps in the journey but also to make mobile payments for services on demand. For example, if a passenger needs to use the airport fast track service and has not pre-booked, they would just walk through, be identified by their biometric and then able to confirm payment.

This seamless identity scenario could even transform the baggage process. What if passengers and their baggage were screened on the move? The passenger simply walks through the security corridor with their carry-on bag. The security team would then use 3D scanning and AI to check and assess for potential threats/risks, with most passengers able to pass through without even pausing.

Achieving a walk-through experience underscores the requirement for all stakeholders to collaborate to achieve the most robust solutions and processes.

54%

AIR TRANSPORT IT LEADERS BELIEVE PERSISTENT BIOMETRIC TRAVEL TOKENS ARE THE NUMBER ONE DRIVER THAT WILL CHANGE THE FUTURE OF PASSENGER EXPERIENCE[10]

ONBOARD

Passenger expectations for a frictionless and personalized experience continue through to the aircraft. Today's flyer increasingly anticipates a level of connectivity comparable to that on the ground and may even base their carrier choice on an airline's ability to deliver it.

FASTER INFLIGHT CONNECTIVITY

While onboard cellular connectivity will take on greater importance, a multi-network approach, offering passengers both Wi-Fi and mobile network technologies is likely to become the norm. This is evidenced by SITA's Passenger IT Insights 2019, which revealed that 90% of airlines are planning to invest in wireless broadband services for passengers over the next three years to 2021.

Today, the industry is capable of delivering high-speed inflight connectivity to meet modern passenger expectations, and adoption of these high-speed options is set to increase over the coming years.

CHEAPER INFLIGHT CONNECTIVITY

SITA's Passenger IT Insights 2019 revealed that while 42% of passengers will connect to Wi-Fi on a flight and 35% to inflight cellular services, these figures fall to 12% and 14% respectively when removing the option of free connections.

Airlines are experimenting with how to reduce the cost of inflight Wi-Fi, with some even offering free access. Mobile operators are expected to start including inflight use within their 'Roam Like at Home' models – further boosting passenger adoption.

As prices fall, it will also become possible for passengers to pay for inflight connectivity services directly through their mobile network carrier – removing a further barrier to adoption.

5G IN THE AIR

With ever-increasing data consumption needs on the ground, 4G networks are widely deployed and 5G networks are already starting to go live. Soon, passengers will be able to connect to these high-speed networks in the air.

SITAONAIR is leading innovation in this space and its new generation airborne solution will provide superior, future-proof inflight connectivity to passengers, delivering a seamless, fast experience that costs less.

90%

AIRLINES ARE PLANNING TO INVEST IN WIRELESS BROADBAND SERVICES FOR PASSENGERS OVER THE NEXT THREE YEARS

AT ARRIVALS

Travelers want airlines and airports to interact with them in the same seamless and ultra-responsive way as their favorite services on the ground. Not just in the airport and onboard, but throughout their journey.

As with pre-travel, once passengers arrive at their destination, they will be increasingly seeking services that will help them with their onward travel. This includes being reunited with their baggage and organizing their ground transportation.

Better integration between airlines, airports and ground handlers, as well as collaboration with travel service partners, will be the key to transforming this experience. A cooperative effort will be needed to deliver both more efficiency to behind-the-scenes processes and provide richer, more responsive services to travelers.

Depending on their destination, passengers can have very different experience on arrival. Because information about what's happening to their baggage, where and when to collect it, is not consistent across all airports and airlines. However, it is clear that there is a thirst for this information – ideally on their own mobile device.

79%

AIRLINES EXPECT TO BE PROVIDING LOCATION-BASED SERVICES BY 2021

DELIVERING THE FUTURE PASSENGER EXPERIENCE

To deliver the experience digital passengers will expect in 2025 demands that airlines, airports and other stakeholders in the passenger journey will have to work far closer together than ever before.

Today, any journey can include up to 20 different organizations including the airline, airport, governments at the border, ground handlers and service providers in and outside the airport. Bringing these parties together is a must in order to deliver the kind of passenger experience the digital traveler we expect by 2025.

Key to this collaboration is sharing relevant data in a secure and timely manner, which will also enable the industry to drive new services that benefit passengers.

Baggage provides a prime example. A key challenge for the industry, over the past decade or more, has been to reduce the cost and impact of mishandled bags. Despite halving the mishandling rate over the last 10 years, from 14.7 bags per 1,000 passengers in 2008 to 5.69 mishandled bags in 2018, the cost to the industry remains significant; not to mention the negative impact it has on passenger experience.

Working with IATA, SITA has helped the industry introduce new baggage tracking to ensure that each bag is tracked at key points across the journey – check-in, loading onto the aircraft, transfer and arrivals. This information is shared with airlines, airports and ground-handlers so that they are aware of where the bag is at each step of the trip.

In 2019, SITA's research showed that where bags were being tracked at check-in and loading, mishandling rates dropped by up to 66%.

This data can also be shared with passengers, allowing them to track their own bags and receive updates throughout the journey. This will reassure them that their bag is traveling on the same flight, information that has been shown to have a significantly positive impact on passenger experience.

Baggage information throughout the journey is a work in progress. While the majority of airlines have plans to provide tracking and status information to their passengers' mobiles, there are opportunities, thanks to IATA's bag tracking initiatives, to provide extra details. These include carousel number, first bag and last bag arrival time, and pick-up information for priority or outsized luggage.

The industry is already working towards total airport management systems that connect the terminal and airside operations. These will go some way to providing a holistic platform for the airport community to collaborate.

As we look to 2025, the ability to share data and draw new insights from it will help drive new services and streamline the passenger journey even more.

UP TO 66%

FEWER BAGS MISHANDLED WHEN BEING TRACKED AT CHECK-IN AND LOADING

VIEW: AIRPORT EXPERIENCES IN THE DIGITAL AGE

Today, passengers can see in their everyday lives how consumer-facing products and services are improving and they expect that airports and airlines will respond and innovate in a similar way. Our industry has to make sure that the services we deliver are consumable in a way that is compatible to the way they consume other types of services, like Amazon or Uber.

Technology will profoundly alter the way we will travel in the next few years. We may see passengers arriving at the airport in autonomous vehicles and going through border control and security without taking out their passports or boarding passes, because they can be recognized through their biometric tokens throughout their journey.

Security will be a very smooth process where travelers will not have to remove their shoes or belts, nor take liquids and laptops out of their hand luggage. They will also know exactly when to go to the gate and board the aircraft, maybe by using their seat number to trigger their boarding.

And at arrivals, passengers will be notified when their bags are available and will have digital tools to find their pick-up points, whether that's another autonomous vehicle, or a service like Uber.

At Gatwick, we are exploring a number of innovations to make passengers' experience better at every step. For example, chatbots are an easy way for passengers to interact with the airport. We are working with a ride-share company to integrate indoor navigation into their app, so passengers can easily find their pick-up point. We are also exploring a different way of boarding and applying machine learning to predict the departure time of a flight.

When you put this all together the changes we can expect in the next few years will make a big positive impact on the way passengers experience air travel.

Abhi Chacko
Head of IT Commercial & Innovation, Gatwick Airport

YOUR LONDON AIRPORT Gatwick

FINAL THOUGHTS

By working together to address the needs of the digital traveler in 2025 will deliver a better travel experience while increasing passenger throughput.

The everyday experiences of 'mobile-smart' digital travelers will shape what they expect when traveling and are likely to have a profound influence on aviation IT investments in the next six years.

By 2025, we foresee passengers using their mobile phones to plan their trip in a more integrated way – from transport to the airport and services at the airport, onboard and at their destination. It will be vital to drive innovation throughout the passenger journey, so that no stage becomes a weak link in the chain.

The key technologies that will shape future tools and services available to passengers include cloud services, 5G, biometrics and secure travel tokens, automation, chatbots and AI. In many instances, a combination of these technologies is likely to deliver the greatest benefits.

To deliver the kind of streamlined experience that the digital travelers demand, multiple organizations will need to collaborate including airlines, airports, governments at the border, ground handlers and service providers in and outside the airport.

Sharing relevant data in a secure and timely manner, as well as reaching agreement on standards and processes, will be critical to ensuring that all stakeholders are doing what is required to deliver optimal passenger services. These initiatives will also enable the air transport community to realize the potential to grow revenues, increase throughput and reduce costs.

NOTES AND REFERENCES

1. 83% of the airline and airport IT leadership who attended the SITA Innovation Forum in June 2019 believe that the demographic shift from a pre-digital to a post-digital age will have the most influence on passenger solutions by 2025.
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3. SITA Passenger IT Insights 2019: in 2018, the proportion of passengers using automated gates or kiosks for passport control rose from 21% in 2017 to 44% in 2018.
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8. SITA Air Transport IT Insights 2018: 71% of airlines have investments planned for biometric identity management solutions, 18% of them major programs, over half pilots. 47% of airports are planning secure single biometric tokens for all touchpoints.
9. SITA Air Transport IT Insights 2018: by 2021, 63% of airlines expect to have implemented self-boarding gates using biometrics and ID documentation and 48% using biometrics only; 58% of airports to have implemented biometric gates.
10. 54% of the airline and airport IT leadership who attended the 2019 SITA Innovation Forum assert that biometric travel tokens will be the top driver to change the future passenger experience.

SITA AT A GLANCE

Easy air travel every step of the way.

- Through information and communications technology, we help to make the end-to-end journey easier for passengers – from pre-travel, check-in and baggage processing, to boarding, border control and inflight connectivity.
- We work with about 400 air transport industry members and 2,800 customers in over 200 countries and territories. Almost every airline and airport in the world does business with SITA.
- Our customers include airlines, airports, GDSs and governments.
- Created and owned 100% by the industry, SITA is the community's dedicated partner for IT and communications, uniquely able to respond to community needs and issues.
- We innovate and develop collaboratively with our air transport customers, industry bodies and partners. Our portfolio and strategic direction are driven by the community, through the SITA Board and Council, comprising air transport industry members the world over.
- We provide services over the world's most extensive communications network. It's the vital asset that keeps the global air transport industry connected.
- With a customer service team of over 2,000 people around the world, we invest significantly in achieving best-in-class customer service, providing 24/7 integrated local and global support for our services.
- Our annual Air Transport and Passenger IT Insights for airlines, airports and passengers are industry-renowned, as is our Baggage IT Insights.
- In 2018, we had consolidated revenues of US$ 1.7 billion.

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